



Ethical Junior ISA transfer application form

Business Source

Reference

Please complete this form if you'd like to transfer a Junior ISA held with another provider to a OneFamily Ethical Junior ISA. **You must be the Registered Contact of the existing Junior ISA.** Please complete the form in BLOCK CAPITALS using **black ink** (any amendments must be initialled). Details on how to pay into the account will be sent to you once the new account has been opened.

By completing and returning the Transfer form you are confirming you have read and retained a copy of, the Important Information booklet, which contains the Key Features and Terms and Conditions, as well as the Key Investor Information document. If you have not been able to do this, please call us on 0800 616 695*. These documents can be found at onefamily.com/junior-isa

Please note, we don't advise on or assess the appropriateness of this product for your child. If you feel you require further information about the account before applying please call **0800 616 695*** and speak to a customer service representative. If you're not sure if this account is right for the child, you should seek independent financial advice.

1. Child's details

Title Child's first name Middle initial(s) Child's surname

Date of birth Gender (please tick) Male Female

Permanent UK residential address

Postcode

2. Your details (Remember, you must be the Registered Contact of the existing Junior ISA)

Title First name Middle initial(s) Surname

Date of birth

Permanent UK residential address (if different from above)

Postcode

You can manage this Junior ISA online! Please provide your email address if you'd like more information about online account management:

Email

Home phone Mobile phone

For quick and easy access by phone please provide two security passwords:

A memorable name (e.g. your mother's maiden name) A memorable place (e.g. town of birth)

Data Protection. Family Equity Plan Limited will hold your personal data in line with our Privacy Notice. The full version is here onefamily.com/privacy. It explains your rights as data subject and how we use your data. A copy is also available by writing to OneFamily, 16-17 West Street Brighton, BN1 2RL; by calling Customer Services on 0344 8 920 920* or, by email to customerservices@onefamily.com.

We'd love to share exciting news and articles with you to help you manage your account and your money - you may even get the chance to enter a prize draw! In addition we will share offers with you from our carefully selected partners. You can choose if you'd like to receive this information by ticking the options below. We will hold your personal data in line with our Privacy Notice.

Email Phone

*We're open 9am to 7pm Monday to Friday and 9am to 1pm on Saturdays. We might record your call to help improve our training and for security purposes. We hope you don't mind. Calls are normally free from UK landlines and from mobile phones. For further information please contact your service provider.

3. Authority to transfer into a Junior ISA

This page will be sent to your existing Junior ISA Manager as evidence of your wish to transfer.

Information about you:

Title First name Surname

Date of birth House number/name:

Information about the child: Postcode

Title First name Surname

Date of birth House number/name:

Postcode

Information about the Junior ISA to be transferred:

Name of existing Junior ISA provider Existing Junior ISA provider address

Account number of existing Junior ISA

Roll number (if applicable) Postcode

Sort code (if applicable)

Type of Junior ISA to be transferred:

- Stocks and shares (please note you must transfer the full value of the Junior ISA if transferring a stocks and shares Junior ISA)
- Cash

Please arrange for the transfer of:

- The full value of the Junior ISA. I agree that if I choose to transfer the full value of the Junior ISA, it will close.
- A partial transfer of (please tick any boxes that apply):
 - All subscriptions made on or after 6th April 2022 including any interest or growth earned on those subscriptions (subscriptions made in the current tax year must be transferred in full).
 - All subscriptions made on or before 5th April 2022 including any interest or growth earned on those subscriptions
 - A partial transfer of £ , . from subscriptions made on or before 5th April 2022.

Estimated value of transfer £ , . (min £500).

Some Junior ISA providers may not allow partial transfers. If this is the case we'll contact you to see how you wish to proceed.

4. Declaration and Transfer Authority

I authorise Family Equity Plan Limited:

- To hold the child's subscriptions, Junior ISA investments, interest, dividends and any other rights or proceeds in respect of those investments and cash and,
- To make on behalf of the child any claims to relief from tax in respect of Junior ISA investments

I declare that:

- I am 16 years of age or over
- I have parental responsibility for the named child
- I am the Registered Contact for the Junior ISA
- The child is not a US citizen or resident in the US for tax purposes and I will inform Family Equity Plan Limited immediately if the child becomes a US citizen or so resident

Transfer Authority:

- I authorise my existing Junior ISA provider as specified above to transfer this Junior ISA to Family Equity Plan Limited
- I authorise my existing Junior ISA provider to provide Family Equity Plan Limited with any information, written or non-written, concerning this Junior ISA and to accept any instructions from them relating to this Junior ISA Transfer
- Where a notice period is required, I instruct my existing Junior ISA provider to (please tick one of the following):
 - > Wait for the full notice period to end before going ahead with this transfer.
 - > Proceed immediately with the transfer – I will accept any loss of interest or charges applied as a result of this.

This Junior ISA will be managed under the terms outlined in the Key Features and Terms and Conditions provided with this application form. Before signing this application form, you should read these terms carefully and contact us if there is anything you do not understand.

I accept the JISA Terms & Conditions and confirm that to the best of my belief the information on this form is true.

Signature Date

Anti-money laundering. We reserve the right to make authentication checks on the name and address of the applicant for the purposes of compliance with anti-money laundering legislation. We may use a credit reference agency to help us do this and by signing the application form you are agreeing to such checks.